

Message

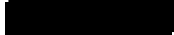
**From:** Haskell Garon [hgaron@google.com]  
**Sent:** 8/26/2019 12:36:37 AM  
**To:** Art Price [arthurp@google.com]; Jordy Smilde [jordysmilde@google.com]; Giulio Minguzzi [gminguzzi@google.com]  
**CC:** Barbara Piermont [bpiermont@google.com]; Phil Lee [phillee@google.com]; Lindsay (Adishian) Pursell [lindsaypursell@google.com]; Zain Abaumer [zaina@google.com]; Rubicon Exchange Bidding [rubicon-eb@google.com]; Eric Batscha [ebatscha@google.com]; pdc-analysts-americas [pdc-analysts-americas@google.com]  
**Subject:** Re: Google & Rubicon Weekly Call Agenda - August 15

+Jordy Smilde +Giulio Minguzzi FYI

Just a reminder that any info about share-shift between OB / AB is extremely sensitive and not something we should be sharing externally (and should be treated with care internally). Let's discuss in comms if there are questions about how to position this to Rubicon or other buyside customers.

On Fri, Aug 23, 2019 at 12:05 PM Art Price <arthurp@google.com> wrote:  
Excellent and thanks, Barbara. Looking forward to talking then.

Arthur Price | Head of Analytics | Google Platforms | [arthurp@google.com](mailto:arthurp@google.com) | Desk: 415.736.5050 | Mobile:



On Fri, Aug 23, 2019 at 4:29 AM Barbara Piermont <bpiermont@google.com> wrote:  
Thanks, I found some time for Monday.

Lindsay and Eric will be in flight/on PTO, but I can fill them in Tuesday before the meeting.

On Thu, Aug 22, 2019 at 7:02 PM Art Price <arthurp@google.com> wrote:  
Hi Barbara,

Phil will be out, but let's chat tomorrow or Monday to discuss how we want to position this info to Rubicon (verbally) in the QBP.

Bidding higher to keep up with a more competitive environment is part of it, but collecting and using floor data is another big part of it, as they were previously not subject to them in many cases and in this new post-UPR world they will be.

I do think this will be magnified further as the frequency of auctions with UPR's increases and we continue our transition into the 1p environment. It's really hard to predict how this impact will play out and how large it will be, as there are too many variables at play (e.g. how they adapt, how AB buyers adapt, how often publishers use UPR, etc.) to do so.

Looking forward to discussing more and walking you through Phil's findings in prep for the meeting.

-- Art

Arthur Price | Head of Analytics | Google Platforms | [arthurp@google.com](mailto:arthurp@google.com) | Desk: 415.736.5050 | Mobile: [REDACTED]

On Thu, Aug 22, 2019 at 2:45 PM Barbara Piermont <[bpiermont@google.com](mailto:bpiermont@google.com)> wrote:  
Thanks for getting this to us so quickly.

What can we offer as advice to Rubicon? Just that it's going to be more competitive now and they will have to increase their bids to win as much as they were before?

Do we think this will be magnified even more so when we make the move to 100% or will AB buyers "learn" by then how to properly bid into a 1p auction? What sort of hit are we expecting the EB business to see when this happens?

On Thu, Aug 22, 2019, 2:17 PM Phil Lee <[phillee@google.com](mailto:phillee@google.com)> wrote:  
+Zain/Analyst team/Haskell as fyi

Hey all,

Here's a quick look at some metrics. I think the most interesting thing isn't necessarily the Rubicon specific piece, but the 3P Buyer v. EB overall piece. More details in the deck but quick bullets:

- Rubicon overall in Control / Experiment: they have less matched queries, and are paying less for those queries (implies there is more competition)
- Rubicon overall on Weather: 37% of matched queries were subject to UPR (presumably that used to be 0 when rules didn't apply to Jedi). That % looks like it's increasing by the day. UPRs could be preventing them from buying impressions they did before rules were applied to them
- EB overall v. 3P overall on Weather - share has shifted to AdX buyers. I think there are 2 factors at play: 1) 3P buyers have less rules (no more AdX legacy, only UPR), Jedi now has rules (UPR) and 2) 3P buyers on average have higher bids v. Jedi...and are now winning more on the same impressions v. EB. If what's happening on Weather is happening on all EB pubs, then I'd expect the shift to continue as a result of the increased competition (esp when factoring in DV and GDN as well)

I'm out next week, but Art and I just chatted on this initial look so he'll be able to help with any q's as needed before the QBP if you want to set up some time.

Thanks!

-Phil

On Thu, Aug 22, 2019 at 12:24 PM Lindsay (Adishian) Pursell <[lindsaypursell@google.com](mailto:lindsaypursell@google.com)> wrote:  
Amazing that you can turnaround something today! Thanks, Phil! Will be helpful to glean prior to the Rubicon QBP next Tuesday.

On Thu, Aug 22, 2019 at 9:22 AM Phil Lee <[phillee@google.com](mailto:phillee@google.com)> wrote:  
No prob! I'm OOO starting tomorrow for basically a week (will be back Wed for a day), so will get something going on a high level today and if we need to dive deeper we can post-Labor Day

On Thu, Aug 22, 2019 at 11:27 AM Barbara Piermont <[bpiermont@google.com](mailto:bpiermont@google.com)> wrote:  
Thanks for your help here Phil.

On Thu, Aug 22, 2019 at 11:23 AM Phil Lee <[phillee@google.com](mailto:phillee@google.com)> wrote:

Thanks Lindsay! I'm not sure all those publishers will be logged in the table Eng created for us, but let me take a look at Rubicon on an aggregate level to see where differences are, and then look at a couple of those big pubs and see where/if spend has shifted from an overall Buyer source perspective. Note that there are a ton of experiments going on -- so I'll only be looking at a couple that eng has prioritized for us as potential end-state candidates. We'll also have to keep this internal only for now.

On Wed, Aug 21, 2019 at 9:02 PM Lindsay (Adishian) Pursell <[lindsaypursell@google.com](mailto:lindsaypursell@google.com)> wrote:

Hi Phil,

Rubicon and the greater EB community have seen a decline in spend since first price / UPR. Rubicon shared their paid imps and ad responses by publisher by date from June - August, which should align to the all up data they've shared that exposes that win rates have declined. If you calculate paid imps / paid responses, you'll get render rate which is what they akin to win rate.

They would like to understand if we can provide an outlook on buyer behaviors across these sites. Barbara mentioned you could help take a look. Please let me know if you'd like my help organizing data, etc.

Also, please note that Rubicon's data may differ from our counts. I imagine you'll want to rely on our reporting, however if you'd like to focus efforts, here are the top 10 publishers by Rubicon's paid imp volume to begin:

Rubicon Publisher Name	Rubicon Publisher ID	DFP Network Code	DFP/AdX Publisher ID
Exchange Bidding - TWC Product and Technology LLC	17756	7646	pub-9867995726204524
CafeMedia - Exchange Bidding	17698	18190176	pub-8501674430909082
Meredith - Exchange Bidding	16258	3865	pub-0978064532142215
Hearst Magazines - Exchange Bidding	15896	36117602	pub-1301581561755234
fluct - Exchange Bidding	19064	62532913	pub-3859050685269056
Italiaonline - Exchange Bidding	17962	5180	pub-0627101520158699
Daily Mail UK - Exchange Bidding	17850	5765	pub-4180835694166255
AccuWeather - Exchange Bidding	17738	6581	pub-9415735639897500
Cricbuzz - Exchange Bidding	17496	1024780	pub-4517325665103541
Marfeel - Exchange Bidding	17990	22571134	pub-2117324400584663

----- Forwarded message -----

From: **Lindsay (Adishian) Pursell** <[lindsaypursell@google.com](mailto:lindsaypursell@google.com)>

Date: Wed, Aug 21, 2019 at 5:39 PM

Subject: Re: Google & Rubicon Weekly Call Agenda - August 15

To: Matthew Brown (Seller Accounts) <[mabrown@rubiconproject.com](mailto:mabrown@rubiconproject.com)>

Cc: Brent Howland <[bhowland@google.com](mailto:bhowland@google.com)>, Eric Batscha <[ebatscha@google.com](mailto:ebatscha@google.com)>, Luis Carrillo <[lcarrillo@rubiconproject.com](mailto:lcarrillo@rubiconproject.com)>, Rakshit Sachdev <[rsachdev@rubiconproject.com](mailto:rsachdev@rubiconproject.com)>, Rubicon Exchange Bidding <[Rubicon-eb@google.com](mailto:Rubicon-eb@google.com)>, Scott Teeman <[steeman@google.com](mailto:steeman@google.com)>, Todd Smith <[tsmith@rubiconproject.com](mailto:tsmith@rubiconproject.com)>

Thanks, Matt! I'll connect with our internal insights team and relay back to you.

Lindsay

On Wed, Aug 21, 2019 at 4:31 PM Matthew Brown (Seller Accounts)

<[mabrown@rubiconproject.com](mailto:mabrown@rubiconproject.com)> wrote:

Hey Lindsay,

No worries, I can pull internal RP data. See attached for 6/1-8/15. Note that this is RP's ad responses to Google and what RP reports as a paid impression. The render/win rate will be different to what Google reports on due to this being our systems numbers vs Google's.

For reference, [here](#) is the RP account to Google account mapping.

Cheers,

On Wed, Aug 21, 2019 at 4:03 PM Lindsay (Adishian) Pursell <[lindsaypursell@google.com](mailto:lindsaypursell@google.com)> wrote:

I can pull from query tool, if you'd like to review for input?

On Wed, Aug 21, 2019 at 4:02 PM Matthew Brown (Seller Accounts)

<[mabrown@rubiconproject.com](mailto:mabrown@rubiconproject.com)> wrote:

Hey Lindsay,

I am happy to provide this data, but doesn't google have access to this same data set in your own reporting?

Best,

On Wed, Aug 21, 2019 at 4:00 PM Lindsay (Adishian) Pursell <[lindsaypursell@google.com](mailto:lindsaypursell@google.com)> wrote:

Hi Matt,

I've been instructed to ask if your team has publisher specific data related to render/win rates over the course of the spend decline. Our insights team may be able to look at buyer spend behavioral patterns this way. Please let me know if the direction has changed, or if you'd like to discuss when we meet during our QBP next week.

Thanks,  
Lindsay

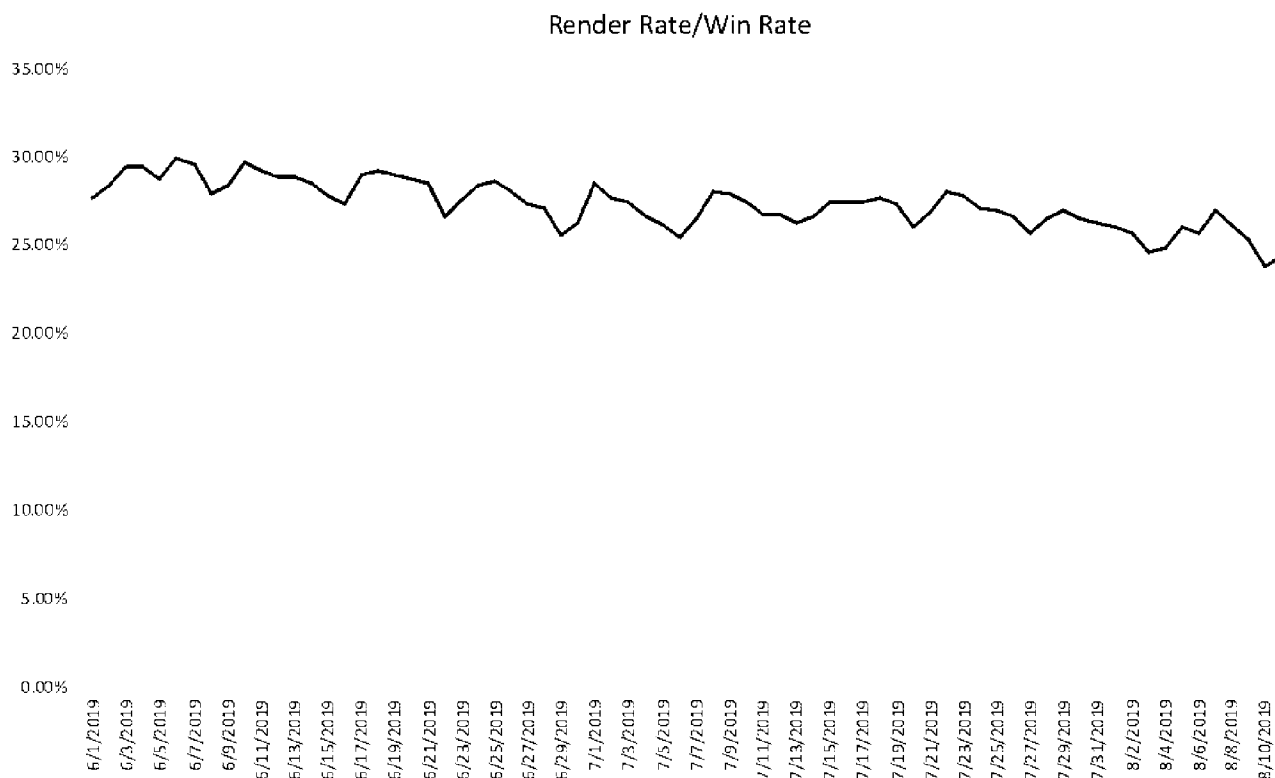
On Thu, Aug 15, 2019 at 1:20 PM Matthew Brown (Seller Accounts)

<[mabrown@rubiconproject.com](mailto:mabrown@rubiconproject.com)> wrote:

Hey Brent,

The Google UI only has data from mid July, but our render rate (RP reported paid imps/ RP responses) shows a decline starting in mid-June and continuing a negative trajectory through yesterday. We went from a consistent 29/30% render rate to one now closer to 23/24%.

Render Rate maps closely to what Google defines as win rate. We believe this is about ~\$100k/day opp loss due to this change.



Cheers,

On Thu, Aug 15, 2019 at 12:50 PM Brent Howland <[bhowland@google.com](mailto:bhowland@google.com)> wrote:  
Hey Rak,

Can you send more information regarding the drop in win rate you mentioned on the call? Any reporting you would like share would be helpful in our investigation.

One big key data point would be if there was a significant revenue % drop so we can evaluate it vs your peers

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Brent Howland | Account Manager | [bhowland@google.com](mailto:bhowland@google.com) | 415-736-9191

On Thu, Aug 15, 2019 at 10:31 AM Brent Howland <[bhowland@google.com](mailto:bhowland@google.com)> wrote:  
Hi Rubicon Team,

Here are the agenda topics for today's call. Anything else?

- Brent Paternity Leave
  - I will be back first week of October
  - Lindsay (Cc'ed here will take over)
- First Price Timeline
  - No update yet on next part of transition
- Outstream Examples
  - Carol still reviewing the samples you provided
- QBP Planning

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Brent Howland | Account Manager | [bhowland@google.com](mailto:bhowland@google.com) | 415-736-9191

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**Lindsay Pursell**

[lindsaypursell@google.com](mailto:lindsaypursell@google.com)

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**Lindsay Pursell**

[lindsaypursell@google.com](mailto:lindsaypursell@google.com)

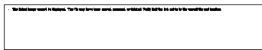
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**Lindsay Pursell**

[lindsaypursell@google.com](mailto:lindsaypursell@google.com)

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**Lindsay Pursell**

[lindsaypursell@google.com](mailto:lindsaypursell@google.com)

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Phil Lee | Senior Analyst - Exchange Platforms | [phillee@google.com](mailto:phillee@google.com) | 626.297.4548

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**Barbara Piermont**



[bpiermont@google.com](mailto:bpiermont@google.com)

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**Lindsay Pursell**



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**Barbara Piermont**



[bpiermont@google.com](mailto:bpiermont@google.com)

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